



United States  
Office of Personnel Management

# **TYPING AND STENOGRAPHY GRADE EVALUATION GUIDE**

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## **NOTE**

This standard has been converted from the original paper format to electronic format without substantive change in series coverage or grading criteria. The standard was reviewed to correct errors that may have been introduced during the conversion process. In some standards minor corrections were made such as updating references to other documents that may have become obsolete, or correcting minor typographical errors in the original standard. Any errors that remain due to conversion to electronic format should be minor and are not intended to change the meaning of the original standard.

If you find page references near the right hand margin of this standard they indicate the pagination of the official, printed version of this standard. For example, a notation "PAGE 2, 4/88, TS-87" would mean that (1) page two of the printed version begins here, (2) the date of issuance was 4/88, and (3) the Transmittal Sheet number was TS-87.

# **Typing and Stenography Grade Evaluation Guide**

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COVERAGE	

Part I of this guide provides grade level criteria for typing work performed on manual or electric typewriters from written material or voice recordings. Part II of this guide provides grade level criteria for stenography and other reporting work in which manual or machine-written symbols or closed microphone or similar mechanical equipment is used to record spoken material.

This guide is used to evaluate typing, stenography, or reporting work assigned to positions in the Clerk-Typist Series, GS-322, the Clerk-Stenographer and Reporter Series, GS-312, and the Closed Microphone Reporter Series, GS-319. It is also used to evaluate both typing and stenographic duties assigned to positions classified in more specialized series when the work requires the services of a fully qualified typist, stenographer, or reporter. These positions will have the title Typing or Stenography parenthetically added to the position title.

This guide supersedes the Typing and Stenography Grade Evaluation Guide issued in January 1979.

## **ORGANIZATION AND USE OF THE GUIDE**

This guide is divided in two parts. Part I applies to typing work, whether from written materials or voice recordings; Part II applies to stenography and reporting work.

When the duties of the position to be evaluated consist wholly of typing, stenography, or reporting work, the appropriate part of the guide is to be used without reference to other standards. When the position consists of a combination of typing or stenography work and other clerical duties, the typing or stenography portion is to be evaluated by the guide and the other duties evaluated by other appropriate standards. The other appropriate standards would be those pertinent to the specialized clerical work performed, e.g., the Personnel Clerk and Assistant Series, GS-203, or, where no specialized standard has been published, the Grade Level Guide for Clerical and Assistance Work. The final grade of the position is to be based on the set of criteria which produces the highest grade for the principal or paramount work of the position. Follow the usual procedures for determining grades by FES standards as set forth in the Instructions for the Factor Evaluation System. In identifying the paramount work of the position, careful attention should be given to the full range of knowledge and judgmental requirements in the context of the total position. Involved in making this determination is consideration of (a) the relative grade level of the clerical work which requires specialized prior experience or training; (b) the nature of the career ladder or ladders in which the position is located; and (c) the relative importance in the position, in terms of the purpose for which the position was established, of (1) the typing or stenography and (2) the clerical work.

## **SERIES DETERMINATION**

This guide is not intended to affect current practice regarding series determination. Positions evaluated as to grade level by means of this guide will continue to be classified in the most appropriate series, in accordance with the definitions published in the Handbook of Occupational Groups and Series and amplifying material in published classification standards.



## **TITLE DETERMINATION**

Positions identified with a series for which classification standards have been issued will be titled in accordance with the published structure. All other positions will be titled in accordance with the practices described in the Introduction to the Position Classification Standards.

Typing is added parenthetically to the title of any position (except positions classified in the Clerk-Typist Series, GS-322) when the position includes a requirement for typing skill at the level of proficiency required under the competitive standard for entry level clerk-typist positions.

Stenography is added parenthetically to the title of any position (except positions classified in the Clerk-Stenographer and Reporter Series, GS-312) when the position includes a requirement for stenographic skill at or above the level of proficiency required under the competitive standard for entry level clerk-stenographer positions.

Some positions classified to specialized clerical series include a requirement for stenographic skill and competitive level typing skill to perform office automation work. For these positions, both Stenography and Office Automation must be added parenthetically to the position's title ; i.e., Secretary (Stenography/Office Automation). This will insure recruitment of candidates with proper knowledge and skill levels for the position. The parenthetical designation of Office Automation may be shortened to OA, e.g., Secretary (Stenography/OA).

A parenthetical title should not be used when the typing or stenographic work is so infrequent or is performed under such circumstances that most or all persons who can perform the other work of the position satisfactorily can also accomplish the typing or stenographic work in a reasonably adequate manner either immediately upon employment, after a reasonable period of experience on the job, or by the use of some other technique or device to accomplish the work. In all cases in which a parenthetical title is used the position description must reflect the duties which necessitated the use of that title.

## **CLASSIFYING POSITIONS WHICH COMBINE STENOGRAPHY WITH OTHER WORK**

There are many positions which combine specialized clerical, assistant, or technical work with a requirement for a qualified stenographer. Positions such as these are classified according to the principles for classifying mixed series positions. In most cases, the series which represents the highest level of work performed will also be the series to which the position is classified. It is possible, however, that analysis of all the factors involved in classifying such a mixed series position will show that the position is properly classified to the series of the lower level work.

Consider, for example, a position classified as Secretary (Stenography), GS-318-5. The secretarial duties are at the GS-4 level, and the stenography duties are at GS-5. In this case the position is not classified to the series of the grade controlling duties but to the Secretary Series, GS-318, which best represents the specialized or paramount knowledge required by the position.

This example shows that the paramount qualifications required by a position are not always represented by the series of the highest level of work performed.

Stenography is parenthetically added to the title of a mixed series position which requires stenographic ability at or above the minimum competitive level and which, in addition, has as its paramount qualification requirement other specialized knowledges and skills. When classifying such a position it is necessary to determine the grade level of each set of duties even when the position's grade level is controlled by work other than stenography. The grade level of the stenography duties will determine the degree of stenographic skill required of the employee.

### *Documenting the Position Description*

The qualification standard for the Clerk-Stenographer and Reporter Series, GS-312, is used to determine an applicant's possession of the required degree of stenographic skill. This standard requires proficiency at 80 words per minute for GS-4 stenography duties, and 120 words per minute for GS-5 stenography duties. Because of this difference in qualification requirements, position descriptions for positions which have the parenthetical title must show the duties on which the requirement for stenographic skill is based and must document the grade level of those duties.

Failure to document this information may lead to the misapplication of the qualification standard. For example, without this documentation it can be mistakenly assumed during the staffing process that a position such as Secretary (Stenography), GS-318-5, automatically requires stenographic proficiency at the GS-5 level (120 wpm) when, in fact, it most likely requires only GS-4 level proficiency (80 wpm). This can lead to otherwise qualified applicants for a position being rated ineligible based on their inability to meet an erroneous degree of stenographic skill.

Documenting the position description, which is also required by the classification standard for the GS-312 series, is essential to the recruitment process and to assure that applicants' qualifications are evaluated appropriately. It may be desirable for classifiers to also document this information on the Request for Personnel Action (SF-52) used to fill the position.

## **SPECIALIZED TERMINOLOGY**

The nature or degree of specialization in terminology affects the extent of the vocabulary and subject-matter knowledges necessary to type from voice recordings or take dictation. (This is not a significant element in typing from written materials.) The kind of terminology encountered also affects the complexity of the shorthand symbols required and the necessity for devising shorthand symbols or letter combinations.

References in the factor level descriptions are to the following definitions:

1. Average or nonspecialized terminology means terms which are commonly used. This includes terms which are technical, but occur frequently and apply to the usual situation where, after a reasonable period, e.g., a month or two, the employee becomes familiar with the terminology peculiar to the organizational unit where the position is located. Material regarding administrative matters which includes technical terms in the fields of medicine, law, science, engineering, or a similar, technical field are examples of this kind of terminology.

2. Specialized terminology involves regular and recurring use of a wide variety of scientific, technical, new, or otherwise specialized terms such as those used in technical reference material, those used in research reports in specialized fields, or new words developed in connection with new or emerging fields so that:

(a) An extensive, specialized vocabulary knowledge is necessary for recognition of the terms used by the speaker; and

(b) Reference to technical dictionaries, texts, unpublished research or developmental materials, or other similar sources is typically required to insure the accuracy of the terms involved; and

© Recording requires the continuous and extensive use of shorthand characters or letter combinations especially established for the terminology involved or personally devised by the shorthand writer (where dictation is taken).

The following are examples of the kinds of materials where specialized terminology may be involved:

1. Chemical compound descriptions.
2. Conference reports of a scientific conference on energy research and development in the field of nuclear power.
3. Verbatim transcripts of a doctor explaining an operation in medical terminology.
4. Verbatim transcripts of courts martial which cover subject matter in diverse technical fields, such as aeronautical engineering, weather terminology, narcotics and chemical analysis, aerospace equipment, and medical or legal terminology.



**GRADE CONVERSION TABLE**

Total points on all evaluation factors are converted to GS grade as follows:

<b>GS Grade</b>	<b>Point Range</b>
1	190-250
2	255-450
3	455-650
4	655-850
5	855-1100
6	1105-1350
7	1355-1600
8	1605-1850
9	1855-2100
10	2105-2350

**PART I - TYPING WORK****FACTOR LEVEL DESCRIPTIONS****FACTOR 1, KNOWLEDGE REQUIRED BY THE POSITION***Level 1-2 -- 200 points*

The skill of a fully qualified typist to operate a manual or electric typewriter. A knowledge of grammar, spelling, capitalization, and punctuation needed to type a variety of material accurately from written sources or voice recordings. A knowledge of the normal formats, forms, typing , policies, and common terminology of the unit or units for which the work is done.

This is the level appropriate for most typing work, whether in a specialized unit or a particular office.

*Illustrations:*

- Typing letters, reports, tabulated data, memoranda, etc., in support of a typical administrative or technical office. Knowledge of grammar, spelling, capitalization, and

punctuation to type in final form from written materials and/or voice recordings using a manual or electric typewriter. Knowledge of format and clerical procedures used in performing the work. Knowledge of functions and procedures of the office.

-- Typing letters, reports, tabulated data, memoranda, etc., in a specialized typing unit serving numerous organizational units. Data is typed from written materials and/or voice recordings. The material usually is typed in draft, returned to the originator for revisions, the revisions typed in, and the product produced in final form or relayed to other locations via communication lines. Knowledge of grammar, spelling, capitalization, and punctuation. Knowledge of format and clerical procedures used in performing the work. Knowledge of procedures of the centralized unit.

### *Level 1-3 -- 350 points*

In addition to Level 1-2, the knowledge to perform typing work that requires considerable training and experience in particular keyboard procedures or, in the case of typing from voice recordings, continual use of specialized terminology.

This level of knowledge normally is required only in specialized clerical units where the employee regularly performs the full range of assignments accomplished by the unit.

### *Illustrations:*

-- Knowledge of specialized terminology to type in final form summary medical reports and laboratory analyses from voice recordings in a centralized typing unit of a large hospital. Training is required in the nature and structure of medical root words, suffixes, and prefixes, along with basic knowledge of anatomy and functional body systems, to distinguish homophones and near homophones, e.g., ilium - ileum, pyretic - pyrotic, sclera - sclero, abduction - adduction, peroneum - perineum, to know which word the speaker intends in a particular context. Knowledge of specialized terminology also is required in order to substitute alternate terms for surgical instruments and procedures or substitute generic terms for brand names of pharmaceuticals. Knowledge of grammar, spelling, capitalization, and punctuation. Knowledge of format and clerical procedures used in performing the work. Knowledge of functions and procedures of the unit. Skill in operating a manual or electric typewriter.

-- Knowledge of specialized coding and proofing symbols and publications formatting procedures to type in camera ready form (for publication) pamphlets, certificates, forms, graphs, technical manuals, or comparable items. The assignments differ from one to another as to required layout, include tabulations with numerous internal or subordinate breakdowns, mathematical or scientific symbols, and similar aspects which require knowledge of the full

range of copy preparation rules and procedures. Prior training is required in use of photocomposition coding systems and editorial marking symbols.

## **FACTOR 2, SUPERVISORY CONTROLS**

### *Level 2-1 -- 25 points*

Duties are performed in accordance with detailed instructions on matters such as format, spacing, and arrangement.

The employee works as instructed and seeks advice on all matters not specifically covered in the original instructions or guidelines.

Work usually is reviewed in draft for accuracy and conformance to instructions. Final copy is reviewed for conformance with the draft or any corrections made in the draft and checked for proper clearances, number of copies, signatures, etc.

### *Level 2-2 -- 125 points*

Instructions are given on the priorities concerning categories of assignments, along with general instructions on limitations, deadlines, and how the work is to be completed. The employee works independently in carrying out the usual run of assignments. Further instructions are provided when unusual assignments present problems, call for deviations from established procedures, or otherwise require specific instructions.

Completed work usually is spot checked for compliance with procedures of the office, appearance, completeness, and typographical errors. When the work is unusual, it is also spot checked for adherence to specific instructions provided.

## **FACTOR 3, GUIDELINES**

### *Level 3-1 -- 25 points*

Specific, detailed guidelines are well established and directly applicable to each task. There is little or no requirement for choice between guidelines. Guidelines consist of standing oral instructions such as office policies or originator preferences, but also include standard references such as organization manuals and style manuals.

The employee works strictly according to the guidelines; deviations must be authorized by the supervisor.



*Level 3-2 -- 125 points*

Procedures such as those for format, preparation and arrangement of correspondence, marking supplemental material, and distribution of copies have been established. Specific guidelines, such as agency or unit instructions, directives, notices, publications, manuals, or technical dictionaries are available for reference.

The employee uses judgment in locating, selecting, and applying the most appropriate, authorized alternative among the various guidelines covering similar situations. For example, the employee uses judgment to determine the spacing and arrangement of the material by considering the nature of the material, its purpose, and the applicability of agency regulations. Situations involving significant deviation from established guidelines or the absence of adequate guidelines are referred to the supervisor.

**FACTOR 4, COMPLEXITY**

In the following, "typing in final form" means the requirement for initial delivery, to a supervisor or originator, of assignments in final form without first producing a rough draft for review and editing by the supervisor or originator. The requirement for typing in final form may exist, however, even when the typist produces a rough copy for editing purposes. Additionally, in those occasional assignments which are unusual or very difficult, the typist may make an intermediate rough draft for the supervisor's review.

*Level 4-1 -- 25 points*

Assignments at this level are clear cut or routine to the point where the typing can be performed with little need for consideration of clerical tasks that precede or follow the actual typing.

Assignments are structured in such a way that there is little choice in deciding what must be done. Actions to be taken are straightforward or repetitious.

*Illustrations:*

- Typing in final form from written materials where text revisions, spacing arrangements, headings, forms used, location of supplemental material, etc., are clearly indicated, and there is little or no choice in determining what needs to be done or how to do the work.
- Typing rough drafts from voice recording or written materials where attention to arrangement is not required, and typographical errors, strike-overs, and similar imperfections are permitted.



*Level 4-2 -- 75 points*

Assignments at this level involve greater variety than those described at Level 4-1. The work usually requires performance of related clerical tasks that precede or follow the actual typing, such as searching files for pertinent supplemental data and checking dates and citations.

The employee must recognize the propriety of correspondence formats, the need for certain routing arrangements, and comparable established requirements.

Actions to be taken differ with the requirements of particular originators, such as correcting errors in spelling and grammar in the material to be typed.

*Illustrations:*

-- Typing in final form from voice recordings or written materials originating in one or more organizational units involving different procedures or subject matter, such that the employee must arrange the material in various formats, assemble the material in proper order, and use files and other references to check information such as citations, dates, and data.

-- Typing a variety of materials in final form from voice recordings or written material when the employee regularly makes changes in the text to correct grammar, improve clarity, and eliminate colloquial or idiomatic expressions. Files and other references are used to check citations, dates, and data.

**FACTOR 5, SCOPE AND EFFECT***Level 5-1 -- 25 points*

The purpose of the work is to perform typing services where the employee performs the usual tasks required to produce the items in final form, e.g., selecting the proper format, spacing and arranging the material, checking references and clearances, correcting misspellings.

The services performed facilitate the work of the originators of the materials.

**FACTOR 6, PERSONAL CONTACTS AND FACTOR 7, PURPOSE OF CONTACTS**

Match the level of regular and recurring contacts with the purpose of the contacts, and credit the appropriate point value using the chart below. Credit only those contacts which are necessary for successful performance of the work.





**Persons Contacted**

Level 1. Employees within the immediate work unit or related support units such as points-of-contact and document originators.

Level 2. Employees at various levels throughout the agency who provide draft material for typing.

**Purpose of Contacts**

To exchange information about the assignment or methods to be used to complete the assignment. For example, clarifying terminology, determining priorities of projects or assignments, discussing additions or revisions.

P U R P O S E	
1	30
2	..... 45

**FACTOR 8 - PHYSICAL DEMANDS***Level 8-1 -- 5 points*

The work is sedentary and requires no special physical demands.

**FACTOR 9, WORK ENVIRONMENT***Level 9-1 -- 5 points*

The work involves minimal risks and observance of safety precautions typical of office settings.

**PART II - STENOGRAPHIC WORK**  
**OCCUPATIONAL INFORMATION**

*Shorthand and Closed Microphone Work*

The recording of spoken material in shorthand involves the use of characters, letters, or other symbols in the phonetic representation of words, phrases, and expressions. Variations in the

complexity of the shorthand symbols involved and in the extent of the necessity for devising shorthand symbols or letter combinations affect the degree of skill required to record spoken material at any specific rate of speed. Most clerk-stenographers use manual systems of writing shorthand with pen or pencil; most shorthand reporters use a system of writing shorthand by machine. Closed microphone reporters use a closed microphone recording device which requires recording spoken material simultaneously with and at the rate equal to that used by the speakers. This requires vocabulary knowledge, concentration, and responsibility for accuracy of the final transcripts equivalent to that of shorthand reporting work.

The difficulty of recording spoken material in shorthand symbols or by closed microphone depends upon the differences in the degree of skill or speed required, the extent of vocabulary required, the complexity of the recording situation, and subject-matter familiarity necessary to recognize the terms used and to follow the speaker (see the terminology section in the introduction to this guide).

### *Skill and Speed Required*

The degree of skill or speed required also depends on whether the speaker or speakers permit interruption, for example, to spell words, repeat words, or define terms. The speaker or speakers may or may not adjust their speech rate to the needs of the employees taking the dictation.

### *Complexity of the Recording Situation*

The complexity of the recording situation affects the difficulty of recording spoken material for reporter positions. The elements involved in evaluating the degree of complexity of the recording situation are (1) the number of active speakers and (2) the formality of proceedings.

1. *Number of Active Speakers:* This relates to the difficulty involved in identifying speakers, adjusting to their speech styles and vocabularies, and associating speakers and material in the transcript.
2. *Formality of Proceedings:* Formal proceedings are those conducted in such manner that each speaker is normally clearly identified and usually speaks only upon recognition or in prescribed order so that the incidence of rapid interchange or overlapping speech is rare. In contrast, informal proceedings are those in which participants generally speak at will, and there is usually no prescribed order followed in the course of the proceedings. As a result, rapid interchange and overlapping speech often occur, participants are frequently not identified, and the requirement for rapid adjustment to frequent changes in voices is generally paramount. The difficulty of identifying the speaker and correctly associating speaker with material, and the intensity of the concentration necessary to follow the spoken material, normally increase directly with increases in the informality of the proceedings.

Judgment usually is necessary in determining whether the proceedings typically assigned for reporting are formal or informal. The decision should be based on the way the proceedings usually and actually occur, rather than on the basis of whether they are normally designated as formal or informal. For example, some courts operate in a very informal manner; some supposedly informal conferences actually proceed in a very formal way.

### *Transcription Work*

Typically, clerk-stenographers personally type the material they have recorded. Reporters may use any of the following methods in transcribing:

1. They may personally type the material they have recorded.
2. They may dictate their notes to a recording machine for transcription by another employee and subsequently review and make any necessary correction of the typed material.
3. Reporting stenographers or shorthand reporters may turn their notes over to another stenographer, then review the typed material for accuracy and any necessary corrections.

The manner in which transcription takes place has no bearing in evaluation of positions.

## **FACTOR LEVEL DESCRIPTIONS**

### **FACTOR 1, KNOWLEDGE REQUIRED BY THE POSITION**

#### *Level 1-3 -- 350 points*

The skill of a fully qualified stenographer to take dictation of nonspecialized terminology. Knowledge of grammar, spelling, capitalization, and punctuation to transcribe material dictated accurately. Knowledge of the formats, forms, clerical procedures, and usual terminology of the organizational unit or units for which the work is done.

This is the appropriate level for most stenographic work, whether in a centralized unit or a particular office.

#### *Illustration:*

- Knowledge and skill required of a stenographer who records and transcribes stenographic notes of correspondence, reports, and similar material; telephone conversations; and office meetings and conferences in a typical administrative or technical office. Knowledge of grammar, spelling, capitalization, and punctuation to prepare the material in final form.

Knowledge of formats, clerical procedures, and common terminology of the organizational unit to which assigned.

*Level 1-4 -- 550 points*

In addition to the knowledges and skill described in Level 1-3, positions at this level require skill in recording and transcribing material involving specialized terminology dictated by one individual, and/or skill in recording and transcribing material involving nonspecialized terminology at hearings, conferences, or similar proceedings when a verbatim recording is required.

*Illustrations:**For Clerk-Stenographer*

-- Knowledge and skill required to take dictation, regardless of speed, from various senior attorneys and other professional staff members. The dictation involves subject matter from a wide variety of unrelated professional, scientific, industrial, and business fields.

*For Reporting, Stenographer, Shorthand Reporter, and Closed Microphone Reporter Positions*

-- Knowledge and skill required to record and transcribe interviews, fact finding proceedings, and conferences when a verbatim recording is required and terminology is nonspecialized. There may be some technical terms relating to the subject matter of the office, but they are familiar and frequently occur.

*Level 1-5 -- 750 points*

In addition to the knowledge and skill described in Level 1-4, positions at this level require skill in taking high-speed (at least 175 words a minute), verbatim dictation which involves specialized terminology. This typically occurs in situations when verbatim transcriptions are required or in formal meetings or hearings when a broad vocabulary of specialized subject matter is necessary to recognize the terms used by the speakers.

This level is the appropriate level for the most difficult work performed by experienced shorthand reporters and closed microphone reporters.

*Illustration:*

-- Knowledge and skill required of shorthand reporters and closed microphone reporters who take high-speed dictation and provide verbatim recordings of courts martial, grievance hearings, scientific conferences, and investigation boards where a wide range of subject matter involving diverse specialized terminology is encountered.



## **FACTOR 2, SUPERVISORY CONTROLS**

### *Level 2-1 -- 25 points*

The employee is given specific assignments with detailed instructions on such requirements as form and presentation.

The stenographer works as instructed and seeks advice on all matters not specifically covered in the original instructions or guidelines.

Transcribed material normally is reviewed in rough draft form for adherence to the material dictated; accuracy of spelling, capitalization, and similar matters; grammatical correctness; propriety of arrangement and spacing of typed material; and conformance with established procedures or instructions regarding clearances, number of copies, signatures, etc. The final transcription is reviewed for conformance with the corrected rough draft.

### *Level 2-2 -- 125 points*

This is the appropriate level for most clerk-stenographer positions. General instructions are given on the priority of categories of assignments, deadlines, and the final forms of the transcription. Additional specific instructions are provided for difficult assignments that differ from normal procedures.

The clerk-stenographer independently transcribes and collates material in final form with responsibility for format, word usage, and grammar. The employee uses initiative in securing information on unfamiliar terms and in assembling supplemental material, but is expected to seek clearance for deviations from the instructions or established procedures.

Completed transcribed material is reviewed in final form for adherence to the materials dictated. It usually is spot-checked for correctness of spelling, punctuation, grammar, and similar matters; propriety of arrangement and spacing; accuracy of any references to source material; and conformance with established procedures or instructions regarding such matters as routings to concerned organizational units, clearances, etc.

### *Level 2-3 -- 275 points*

This level is appropriate for reporting stenographers who make verbatim recordings and for most reporter positions. Assignments are provided with information on general administrative changes, deadlines, and priorities.

The reporter proceeds independently to make verbatim recordings, including insertion of supplemental material in accordance with notations made during the recording. The reporter is solely responsible for the accuracy of the transcribed record.

Final work is reviewed for proper form and completeness. The methods used in providing the transcripts are not susceptible to review.

#### *Level 2-4 -- 450 points*

The supervisor sets the overall objectives and provides guidance by advising the reporter of the nature and subject matter of the proceedings and the date, time, and place for the proceedings to be held.

The senior reporter, having developed expertise in high-speed verbatim reporting, is assigned the most difficult cases. The employee is responsible for planning and carrying out the assignment, resolving conflicts which arise, and coordinating the work when two or more shorthand reporters participate in recording and/or transcription. The employee determines sources for reference material required to learn and understand the technical terms used.

Work is reviewed to determine if deadlines have been met; there is conformance to policies, regulations, and procedures; and users will be satisfied.

### **FACTOR 3, GUIDELINES**

#### *Level 3-1 -- 25 points*

Specific, detailed guidelines are well established and directly applicable to each task. There is little or no requirement for choice among guidelines. The guidelines include standing oral instructions, such as office policies or dictator preferences, and standard references, such as style manuals, dictionaries, and organization manuals.

Stenographic duties are performed in strict adherence to the guidelines; deviations must be authorized by the supervisor.

#### *Level 3-2 -- 125 points*

Procedures, such as those for format, preparation and arrangement of correspondence, marking supplemental material, and distribution of copies have been established. Specific guidelines, such as agency or unit instructions, directives, notices, publications, manuals, or technical dictionaries are available for reference.



The employee uses judgment in locating, selecting, and applying the most appropriate authorized alternative among the various guidelines covering similar situations. For example, judgment is required to determine the spacing and arrangement of the material by considering the nature of the material, its purpose, and the applicability of agency regulations. Situations involving significant deviation from established guidelines or the absence of adequate guidelines are referred to the supervisor.

*Level 3-3 -- 275 points*

This level is appropriate only for reporter positions. Administrative procedures and guidelines are available for convening a court or a board, but they are not applicable to all situations. Material dictated concerns new subject matter fields or a wide variety of scientific, technical, or otherwise specialized terms which necessitate searching in the library, or reference to unpublished research or developmental material, to understand the terms used.

The reporter uses judgment in properly identifying and protecting exhibits which have been received in evidence, and in deciding how best to assemble all documents to conform to the formal requirements of regulations and verbatim proceedings. Judgment is also required in locating personnel in concerned organizational units of the employing agency to insure the accuracy of terms used, and in locating supplemental material and deciding whether it should be included in a summary or in the record.

## **FACTOR 4, COMPLEXITY**

*Level 4-1 -- 25 points*

The work consists of tasks that are clear-cut and directly related. The work includes recording and transcribing material, such as routine memoranda, reminders, transmittal letters, and other material that recurs regularly or involves matters of normal, routine subject matter.

There is little or no choice to be made by the employee in deciding what needs to be done. Stenographic notes of other than a routine nature are usually transcribed in rough draft form for review by the dictator.

The work is quickly mastered. Actions to be taken are easily understood. The dictator adjusts the rate of dictation to the recording speed of the clerk-stenographer.

*Level 4-2 -- 75 points*

The work consists of duties that involve related steps, processes, or methods. Terminology of material dictated is typically nonspecialized as in Level 4-1, but assignments are of greater variety and include recording and transcribing letters, reports, and memoranda.

The decision regarding what needs to be done involves various choices requiring the employee to recognize the existence of and differences among a few easily recognizable situations. The formats vary, depending on the nature of the material. Material normally is dictated by one individual without regard to the recording speed of the stenographer. Actions to be taken differ in such things as making changes in the text to improve clarity, correcting grammar, and eliminating colloquial or idiomatic expressions in the final form.

#### *Level 4-3 -- 150 points*

The work includes various duties involving different and unrelated processes and methods. Clerk-stenographers record and transcribe, from one individual, dictation containing a variety of specialized terminology and perform other duties such as securing material for inclusion in the final copy. Reporting stenographers record and transcribe material involving common and/or specialized terminology at hearings, conferences, or similar proceedings where either a nonverbatim transcript is acceptable or repetition or delay is permitted in making a verbatim transcript. Reporters make verbatim recordings of spoken material at hearings, conferences, or similar proceedings when the material involves common terminology. Interruption is not permitted except in the case of unintelligible speech.

The decision regarding what needs to be done depends upon the analysis, phase, or issues involved in each assignment, and the chosen course of action may have to be selected from many alternatives. The stenographer must devise shorthand symbols or letter symbol combinations to report spoken material correctly. Reporting stenographers and reporters must identify and adjust to the speech style and vocabulary of each speaker.

The work involves conditions and elements that must be identified and analyzed to discern interrelationships. The clerk-stenographer is independently responsible for securing information from reference sources on terms peculiar to new fields or on unfamiliar words. Reporting stenographers and reporters must associate speaker and material in the transcript.

#### *Level 4-4 -- 225 points*

The work typically includes varied duties requiring many different and unrelated processes and methods. Assignments involve specialized, unrelated areas of administrative or technical subject matter and exceptional difficulty in the recording situation.

Decisions regarding what needs to be done include the assessment of unusual circumstances, variations in approach, and incomplete or conflicting data. Verbatim transcripts of specialized

terminology are required, and interruption is not permitted except when speech is inaudible or unintelligible.

The work requires making many decisions concerning the interpretation of considerable data or refining the methods and techniques to be used. Courts, hearings, and conferences usually involve numerous participants (over 10), and are conducted in an informal manner with rapid interchange and overlapping speech.

### **FACTOR 5, SCOPE AND EFFECT**

#### *Level 5-1 -- 25 points*

The purpose of the work is to provide stenographic services where the employee performs the usual tasks required to produce materials in final form, e.g., selecting the proper format, correcting grammar, assembling documents in the proper order, and checking citations and references.

The services performed facilitate the work of the originators of the material.

#### *Level 5-2 -- 75 points*

For reporter positions, the purpose of the work is to record and produce verbatim transcripts for administrative record purposes, as evidence in hearings or court cases, or for similar purposes. The employee is personally responsible for one segment of the proceedings; i.e., the official record.

The services provided affect other organizations or individuals who depend on the accuracy of the transcript in further decisions, higher level appeals, etc.

### **FACTOR 6, PERSONAL CONTACTS AND FACTOR 7, PURPOSE OF CONTACTS**

Match the level of regular and recurring contacts with the purpose of the contacts, and credit the appropriate point value using the chart below. Credit only those contacts which are necessary for successful performance of the work.

#### *Persons Contacted*

Note: For stenographers and shorthand reporters, being in a room with people and taking down what they say without any meaningful verbal interaction is not to be credited as personal contacts. Contacts made for such purposes as making arrangements for the recording of proceedings,

securing seating charts, and obtaining information from participants concerning their identity or the identity of other participants should be credited as personal contacts.

*Level 1.* Employees within the immediate organization, office, project, work unit and related or support units. Included are people who are dictating material to be transcribed.

*Level 2.* Employees at various levels throughout the agency, such as originators, when the work is done in a centralized stenography unit. Contacts may also include individuals outside the agency such as attorneys, police officers, witnesses, judges, and other personnel involved in hearings and court proceedings.

### *Purpose of Contacts*

*Level A.* To exchange information about the assignment or methods to be used to complete the assignment or project. For example, reporting progress or problems encountered, correcting typed materials, clarifying terminology, delivering completed work, and reporting equipment malfunctions.

*Level B.* To resolve problems or to plan or establish stenographic or reporter services. For example, contacting participants in conferences or similar proceedings to make arrangements, secure seating arrangements, and obtain other necessary information.

P U R P O S E		
C O N T A C T S		
	a	b
	1	60
	2	75

## **FACTOR 8 - PHYSICAL DEMANDS**

### *Level 8-1 -- 5 points*

The work is sedentary and requires no special physical demands.

## **FACTOR 9, WORK ENVIRONMENT**

*Level 9-1 -- 5 points*

The work involves minimal risks and observance of safety precautions typical of office settings.